10 Appendix 1 – Certified CADDIS Training Curriculum

Day One – Web-Based Presentation – 8:00 a.m. – 11:45 a.m.
CADDIS 101 – CADDIS Fundamentals
Course Curriculum

Course Module	Estimated Module Length	Module Components
Introduction	15 minutes	• **Expectation setting for CADDIS Training** • **Review of objectives for Certified CADDIS Training**
CADDIS Navigation Overview	45 minutes	• **Home page navigation and message center processes** • **Main menu** • **Headers and buttons including Help** • **Tabs and flags** • **Types of fields**

CADDIS Demonstration	1 hour	• **Walk through of CADDIS processes including:**
		  o **Call Logging and Screening Overview**
		  o **Consumer Overview**
		  o **Quality Assurance Overview**
		  o **Resource Development Overview**
		  o **Provider Authorization Overview**
		  o **Operations Invoicing Overview**
		  o **Consumer Trust Management Overview**

Break	15 minutes	
Demonstration of System Setup	45 minutes	• **CADDIS Regional Center structure** • **Overview of system security and setup activities** • **Workflow and alerts** • **Signing and co-signing**
Reporting	30 minutes	• **Report parameters** • **Sort options for reports** • **Report viewing and printing** • **Access to ad hoc reports**
Wrap up	15 minutes	

Day One (11:45 a.m. – 5:00 p.m.)
CADDIS 201-A Consumer Case Development
Course Curriculum

Course Module	Estimated Module Length	Module Components
Lunch	1 hour	
Course Overview	15 minutes	• **Welcome and Housekeeping items** • **Expectation setting and review of course objectives**
CADDIS Navigation	45 minutes	• **Logging into CADDIS** • **Viewing the Home Page** • **Practice navigating between menus, tabs and flags** • **Viewing on-line help** • **Practice navigating between fields using a Scheduling exercise** • **Printing in CADDIS** • **Custom comments and tokens**
Call Screening and Logging	30 minutes	• **Enter a screening record for a Consumer** • **Enter a call logging record**
Consumer Profiles	1 hour	• **Migration from a Pre-Consumer to a Consumer** • **Consumer advanced and statewide searches (including Consumer duplicate checks)** • **Creating Consumer Profiles** • **Consumer summary pages**
Break	15 minutes	
Insurance and Benefits	30 minutes	• **Insurance records and linking insured persons to payor plans** • **Medi-Cal records** • **SSI and Wage benefits for Consumers (including pre-trust Consumers)**
Eligibility and Referrals	45 minutes	• **Consumer applications** • **Eligibility determination** • **In-house and external referrals**
Wrap Up	15 minutes	

Day Two (8:00 a.m. – 5:00 p.m.)
CADDIS 201-A Consumer Case Development
Course Curriculum

Course Module	Estimated Module Length	Module Components
Notice of Action and Consumer Appeals	30 minutes	• **Notice of Action records and linking to other records** • **Appeals for Consumers** • **Attaching appeals for Consumers** • **Associating appeals to other events** • **Recording and reviewing appeal levels and status**
Episodes and Service Periods	45 minutes	• **Internal service periods (admissions) for a consumer** • **Viewing the episode associated with the service period** • **Entering and changing primary staff information on the Episode** • **Service period closing** • **Intra-Regional Center transfers**
Diagnosis Entry	15 minutes	• **Axis I-V diagnostic information**
Break	15 minutes	
Service Planning and Reviews	1 hour and 15 minutes	• **Creating service plans (IPP or IFSP)** • **Creating plan reviews**
Assessments	1 hour	• **Overview of available assessments** • **Overview of standard assessment flags and processes** • **Entering TCM services** • **Creating CDER and Early Start Assessments** • **Reporting consumer progress**
Lunch	1 hour	
Presentation Skills	1 hour	• **Adult learning methods** • **Effective demonstration techniques** • **Teach-back session**
Provider Searches	30 minutes	• **Searching for providers** • **Adding needed resource records**
Break	15 minutes	

Course Module	Estimated Module Length	Module Components
Provider Authorization	1 hour	• **Selecting a Consumer and a Provider Program** • **Selecting services and rates** • **Creating a financial resources record** • **Creating an authorization record** • **Linking a service plan** • **Signing the authorization** • **Creating a new version** • **Viewing Provider Payment Authorization History**
Consumer Trust Management	30 minutes	• **Identify a trust Consumer** • **Review trust information** • **Disbursement requests**
Wrap up	15 minutes	
Sandbox Practice	30 minutes	• **Chart/Document Location exercise** • **Information Request exercise** • **Miscellaneous exercises**

Day Three (8:00 a.m. – 5:00 p.m.)
CADDIS 201-A Consumer Case Development
Course Curriculum

Course Module	Estimated Module Length	Module Components
Service Entry and Notes	1 hour	• **Progress note entry for services provided** • **Service entries and linking to progress notes** • **Linking progress notes to Service Plans and Assessments**
Legal Status and Conservator Tracking	30 minutes	• **Creating legal status records and events** • **Associating legal status records to legal events** • **Linking responsible parties to contact records**
Waiver Tracking	30 minutes	• **Creating waiver eligibility and criteria records** • **Creating consent records**
Break	15 minutes	
Special Incident Reports	1 hour	• **Creating special incident reports** • **Creating informed parties, involved parties, and inquiry records** • **Associating events to the Special Incident Report** • **Entering follow up and outcome information (including mortality information)** • **Adding correspondence information** • **Signing the report**
Medication Tracking	30 minutes	• **Creating medication records** • **Searching for medications and providers**
Review the Consumer Case Records Summary Screen	15 minutes	• **Highlights and navigation in the Consumer Case Records Summary Screen**
Lunch	1 hour	
Presentation Skills	1 hour	• **Using the Training Environment** • **Teach-back session**
Case Transfers	1 hour	• **Overview of Transfer types** • **Transfer summary information** • **Creating agreement records for shared case management consumers** • **Creating requests and agreements to transfer cases to other Regional Centers**
Break	15 minutes	
Consumer Notes	15 minutes	• **Creating system-wide chart notes on a consumer record**
Consumer Reports	30 minutes	• **Review of available Consumer reports**

Wrap Up	15 minutes	

Sandbox Practice	45 minutes	• **Mastery evaluation and miscellaneous exercises**
		• **An exercise for Budget Creation for Self-Directed Consumers will be available for applicable Regional Center participants:**
		   o **Creating consumer budget and broker records**
		   o **Associating waivers**
		   o **Creating dollar entry records**
		   o **Associating budget entries to provider authorizations**

The following additional CADDIS User Training Material will be developed for Managers:

- Approvals

- Reviewing outstanding staff calendars, caseloads, outstanding tasks, and unit tasks.

Day Four (8:00 a.m. – 5:00 p.m.)
CADDIS 201-B Quality Assurance
Course Curriculum

CADDIS Module	Estimated Module Length	Module Detail
Course Overview	15 minutes	• **Welcome and Housekeeping items** • **Expectation setting and review of course objectives**
CADDIS Navigation	45 minutes	• **Logging into CADDIS** • **Viewing the Home Page** • **Practice navigating between menus, tabs and flags** • **Viewing on-line help** • **Practice navigating between fields using a Scheduling exercise**
Quality Assurance Monitoring	45 minutes	• **Creating a monitoring visit** • **Adding findings, interview, and follow up information** • **Associating the monitoring record to other events** • **Signing the record**
Break	15 minutes	
Quality Assurance Evaluations	30 minutes	• **Creating an evaluation record** • **Adding team, interviews, findings, and follow up information** • **Associating the evaluation to other events** • **Signing the record**
Quality Assurance Technical Assistance	30 minutes	• **Creating a new technical assistance record** • **Entering assistance team and attendee information** • **Associating the technical assistance to other events**
Quality Assurance Complaints and Rapid Response	30 minutes	• **Creating complaint records** • **Creating compliant Inquiries** • **Creating rapid response reports**
Quality Assurance Immediate Danger	30 minutes	• **Creating an Immediate Danger record** • **Recording Findings and Informed Parties information**
Lunch	1 hour	
Presentation Skills	45 minutes	• **Using the Training Environment** • **Teach-back session**

CADDIS Module	Estimated Module Length	Module Detail
Corrective Plans	30 minutes	• **Creating a Corrective Plan** • **Recording substantial inadequacies and citations** • **Recording informed parties** • **Recording plan actions**
Sanctions	30 minutes	• **Creating Sanction records** • **Managing and tracking sanctions**
Break	15 minutes	
Recording Provider Notes	15 minutes	• **Recording a note for a provider**
Viewing, updating, and attaching Special Incident Reports to Quality Assurance events	30 minutes	• **Viewing Special Incident Reports** • **Updating Special Incident Reports** • **Attaching Special Incident Reports to other Quality Assurance events**
Quality Assurance Reports	15 minutes	• **Review of available Quality Assurance reports**
Wrap Up	15 minutes	
Sandbox time	45 minutes	• **Chart/Document Location exercise** • **Information Request exercise** • **Mastery evaluation and miscellaneous exercises**

Day Five (8:00 a.m. – 5:00 p.m.)
CADDIS 201-C Resource Development
Course Curriculum

Course Module	Estimated Module Length	Module Detail
Course Overview	15 minutes	• **Welcome and Housekeeping items** • **Expectation setting and review of course objectives**
CADDIS Navigation	45 minutes	• **Logging into CADDIS** • **Viewing the Home Page** • **Practice navigating between menus, tabs and flags** • **Viewing on-line help** • **Practice navigating between fields using a Scheduling exercise**
Provider Organizations	45 minutes	• **Creating Provider Organization records** • **Associating Consumers to Provider Organizations**
Break	15 minutes	
Provider Locations	1 hour	• **Creating Provider Location records** • **Association of Locations to Organizations**
Provider Programs and Capacity Management (part one)	1 hour	• **Creating Provider Program records including identifying a liaison and associating a program with a location** • **Associating Programs to locations** • **Service identification and service attribute assignment for Programs** • **Discussion of generic programs** • **Creating a home managed by an AFHA provider** • **Waiver and exception assignments for Programs** • **Provider service periods**
Lunch	1 hour	
Presentation Skills	1 hour	• **Adult learning methods** • **Effective demonstration techniques** • **Teach-back session**
Provider Programs and Capacity Management (part two)	30 minutes	• **Creating Program capacity records including population, accessibility attributes and individual openings** • **Linking Consumers to Programs** • **Creating non-vendored providers**

Course Module	Estimated Module Length	Module Detail
Provider Fiscal and Business Data	45 minutes	• **Creating Provider location tax records** • **Attaching Provider location tax records to Provider programs** • **Creating Provider location bank records**
Break	15 minutes	
Wrap Up	15 minutes	
Sandbox Practice	1 hour and 15 minutes	• **Chart/Document Location exercise** • **Information Request exercise** • **Miscellaneous exercises**

Day Six (8:00 a.m. – 5:00 p.m.)

CADDIS 201-C Resource Development

Course Curriculum

Course Module	Estimated Module Length	Module Detail
Provider Staff	1 hour	• **Creating Provider Staff records** • **Associating Provider Staff and consultants with Provider Programs** • **Regional Center Staff sharing**
Provider Searches	30 minutes	• **Searching for Providers** • **Adding Needed Resources records**
Break	15 minutes	
Provider Application Tracking	1 hour	• **Creating Provider Applications** • **Tracking documentation and application status** • **Recording dispositions** • **Creating new Programs for applicants** • **Assigning emergency status for Consumer Living Situations** • **Creating Program Design records** • **Providing new program development funds**
Provider Appeals	45 minutes	• **Creating appeals for Residential Providers and on-going vendors** • **Attaching appeals to an applicant and Provider Program** • **Associating appeals to other events** • **Recording and reviewing appeal levels and status**
Lunch	1 hour	
Presentation Skills	1 hour	• **Using the Training Environment** • **Effective exercise supervision** • **Teach-back session**
Provider Rates (part one)	1 hour	• **Review the Provider Authorization process** • **DDS Global Schedule rates** • **Creating rounding rules for Provider rates** • **Creating and approving new Provider rates**
Break	15 minutes	
Provider Rates (part two)	45 minutes	• **Rate updates and audit trails** • **Creating rate agreements** • **Consumer accommodation rates** • **Approving rate agreements**

Course Module	Estimated Module Length	Module Detail
Provider Contracts	1 hour and 15 minutes	• **Creating contracts** • **Tracking fiscal management items** • **Attaching loan records** • **Establishing Dollar Based limits** • **Contract tracking, documentation and follow-up** • **Contract approval**
Wrap up	15 minutes	

Day Seven (8:00 a.m. – 12:30 p.m.)
CADDIS 201-C Resource Development
Course Curriculum

Course Module	Estimated Module Length	Module Detail
Transportation Routes and Requests	1 hour and 30 minutes	• **Searching for appropriate routes** • **Adding transportation routes** • **Identifying origination points, destination points, and stops** • **Creating a transportation request and entering Consumer information** • **Requesting new routes and identifying Provider program hours** • **Assigning a Consumer to a route**
Provider Notes	30 minutes	• **Creating notes for a Provider**
Break	15 minutes	
Resource Development Reports	30 minutes	• **Review of available Resource Development reports**
Viewing Special Incident Reports	15 minutes	• **Viewing Special Incident Reports**
Wrap Up	15 minutes	
Sandbox Practice	1 hour and 15 minutes	• **Mastery evaluation and miscellaneous exercises**

Day Seven (12:30 p.m. – 5:00 p.m.)

CADDIS 201-D Fiscal

Course Curriculum

Course Module	Estimated Module Length	Module Components
Lunch	1 hour	
Course Overview	15 minutes	• **Welcome and Housekeeping items** • **Expectation setting and review of course objectives**
CADDIS Navigation	45 minutes	• **Logging into CADDIS** • **Viewing the Home Page** • **Practice navigating between menus, tabs and flags** • **Viewing on-line help** • **Practice navigating between fields using a Scheduling exercise** • **Printing in CADDIS** • **Custom comments and tokens**
General Ledger	45 minutes	• **Creating a new general ledger account** • **Viewing account transactions and general journal batch information details** • **Creating and posting a general journal batch** • **Creating a recurring general journal batch**
Break	15 minutes	
Fixed Asset Management	30 minutes	• **Entering a fixed asset record** • **Copying a fixed asset to a new record** • **Creating a depreciation record** • **Entering a disposal record**
Budget Management	45 minutes	• **Viewing and editing a budget list** • **Adding a general ledger account to an existing budget worksheet** • **Creating a new budget worksheet** • **Copying a budget** • **Merging budgets** • **Viewing budgets using the budget tool** • **Creating a budget batch** • **Posting an adopted budget** • **Creating a restricted fund record** • **Associating a restricted fund record to a general ledger segment**
Wrap Up	15 Minutes	

Day Eight (8:00 a.m. – 5:00 p.m.)
CADDIS 201-D Fiscal
Course Curriculum

Course Module	Estimated Module Length	Module Components
Provider Authorizations	30 minutes	• **Creating a new Provider authorization** • **Selecting services and rates** • **Creating a financial resources record** • **Creating a new Provider authorization review record** • **Linking a service plan measurable** • **Signing a Provider authorization** • **Creating new versions**
Provider Authorization Payment History	15 minutes	• **Viewing a payment record** • **Viewing an authorization** • **Viewing payment histories by Consumers, authorizations and Provider programs**
Provider Invoices	1 hour	• **Creating a participation invoice record** • **Generating a payment invoice** • **Printing a paper invoice** • **Creating an attendance file record to export an invoice** • **Creating an online billing record** • **Entering and verify participation data** • **Editing and accruing invoices** • **Identifying batch invoices ready to be accrued**
Break	15 minutes	
Accounts Payable Adjustments	45 minutes	• **Creating an invoice adjustment** • **Creating a percentage reduction invoice adjustment** • **Creating a dollar amount invoice adjustment** • **Creating a refund record** • **Creating a payment correction** • **Creating a retro-rate change record**
Garnishments	30 minutes	• **Lesson One – How to search for and create a garnishment record** • **Lesson Two – How to apply the garnishment before issuing a payment** • **Lesson Three – How to specify the liability and AP accounts for credit memos or invoices based on a garnishment**

Course Module	Estimated Module Length	Module Components
Operations Invoicing	45 minutes	• **Creating an operations vendor record** • **Entering additional information to the vendor record** • **Creating a distribution matrix** • **Creating a classification code** • **Entering bank information for an operations vendor** • **Creating a purchase order** • **Entering an invoice**
Lunch	1 hour	
Presentation Skills	1 hour	• **Adult learning methods** • **Effective demonstration techniques** • **Teach-back session**
Accounts Payable	45 minutes	• **Creating and posting an account payable invoice batch** • **Preparing payments and printing checks** • **Recording a manual check** • **Setting up an ACH record** • **Issuing a payment by creating an EFT file for ACH processing** • **Voiding a check** • **Deleting an operations check** • **Posting the journal entry to the general ledger**
Break	15 minutes	
Accounts Receivable	45 minutes	• **Creating a manual invoice batch** • **Editing an open invoice** • **Creating a recurring invoice batch** • **Posting an invoice batch**
Loan Management	30 minutes	• **Entering a loan terms record** • **Editing a repayment schedule record** • **Creating a disbursements record** • **Viewing a transaction history and calculate payoff**
Wrap Up	15 minutes	
Sandbox Time	30 minutes	

Day Nine (8:00 a.m. – 5:00 p.m.)
CADDIS 201-D Fiscal
Course Curriculum

Course Module	Estimated Module Length	Module Components
Bank Reconciliation	30 minutes	• **Creating a bank reconciliation** • **Entering payment information** • **Entering bank adjustments** • **Entering general ledger adjustments** • **Viewing and printing a reconciliation report**
State Claims	30 minutes	• **Generating a state claim** • **Reviewing a state claim**
Consumer Trust Management (part one)	1 hour	• **Creating a trust bank account** • **Associating a trust account to a bank** • **Creating an employer record** • **Creating a benefit agency record** • **Searching for a consumer** • **Entering a trust account record for a consumer** • **Creating a Consumer asset record** • **Creating a Consumer employment record** • **Creating a Consumer allocation record**
Break`	15 minutes	
Consumer Trust Management (part two)	2 hours	• **Processing a recurring receivables** • **Un-committing funds in batch maintenance** • **Creating, applying and processing a manual receipt** • **Applying receipts to receivables** • **Creating an interest record** • **Creating an adjustment** • **Creating an disbursement batch** • **Processing a disbursement batch**
Lunch	1 hour	
Presentation Skills	1 hour	
Federal and State Reporting	25 minutes	• **Processing a 1099 report** • **Processing EDD reporting, record submitting, resubmitting, and correspondence reports**
Fiscal Reports – Sorting, viewing, and printing	20 minutes	• **Review of available fiscal reports**
Break	15 minutes	

Course Module	Estimated Module Length	Module Components
Fiscal Audits	45 minutes	• **Creating pre-audit records** • **Creating finding, fiscal outcomes and audit activity records** • **Creating Provider contact, documentation, and correspondence records** • **Associating Consumers to fiscal audits**
Wrap Up	15 minutes	
Sandbox Practice	45 minutes	• **Mastery evaluation and miscellaneous exercises**

The following additional CADDIS User Training Material will be developed for Managers:

- Approvals

- Reviewing outstanding staff calendars, caseloads, outstanding tasks, and unit tasks.

Certified CADDIS Training Pre-requisites

Pre-Requisite	Description
Computer literacy	Strong understanding of Microsoft Windows applications including using the World Wide Web and launching/closing applications.
Policies and Procedures	An overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area. An understanding of Regional Center policies and procedures.
Current job skills	Experienced and competent in the Regional Center's current business processes and systems. An understanding of the Regional Center's current processes that relate to the participant's job.
DDS Training	Service Coordinator's attending Certified CADDIS Training must first attend the CDER and/or Early Start assessment training that will be delivered by DDS staff.
CADDIS Fundamentals	Successful completion of CADDIS 101 – Fundamentals course prior to attendance at any of the subsequent Certified CADDIS Training courses.
Trainer Skills	An eagerness to learn and willingness to teach others in CADDIS.

11 Appendix 2 – System Administration Training and Ad Hoc Report Training Curriculum

Day One (8:00 a.m. – 5:00 p.m.)

CADDIS 301-A System Administration Training for DDS

Course Curriculum

CADDIS Module	Estimated Module Length	Module Components
Overview of System Administration processes	1 hour	• **Overview of DDS System Administration responsibilities** • **Overview of Regional Center Administration responsibilities** • **Report Sharing**
Option Lists	1 hour	• **Adding items to DDS controlled cross reference codes and option lists** • **Modifying and updating DDS controlled option lists**
Break	15 minutes	
User Set up	45 minutes	• **Creating new user accounts and passwords** • **Updating and deleting user accounts and passwords** • **Reactivating user accounts**
Lunch	1 hour	
System Security	1 hour	• **Structure security** • **Tab level security** • **Role-based security** • **Security maintenance**
User Group Set up	1 hour	• **Creating new user groups** • **Adding users to groups using the user group and user screens** • **Assigning screen access to user groups**
Break	15 minutes	
IP Masking	15 minutes	• **Allowing and denying access through IP addresses**
User Sessions	15 minutes	• **Viewing user sessions**
Global Variables	30 minutes	• **Setting up Global Variables including Security Global Variables**
Customizing the Help Screen	45 minutes	• **Updating and deleting customized Help screens**

CADDIS Module	Estimated Module Length	Module Components
System Setup (part one)	1 hour	• **Setting the time zone** • **Menu setup** • **Enterprise setup** • **Entity setup** • **Access setup**

Day Two (8:00 a.m. – 5:00 p.m.)

CADDIS 301-A System Administration Training for DDS

Course Curriculum

CADDIS Module	Estimated Module Length	Module Components

System Setup (part two)	2 hours and 30 minutes	• **Assessment setup**
		• **TCM setup**
		• **IPP setup**
		• **Inter and Intra-Regional Center Transfers**
		• **Service Provider fee level setup**
		• **Service Code setup**
		• **Legal Status setup**
		• **Medication setup**
		• **Universal lookup**
		• **Form Configurator**
		• **License Type Groups**
		  o **Adding and deleting license type groups**
		  o **Adding and deleting license types**
		  o **Updating license types and license type groups**
		• **Diagnosis Maintenance**
		  o **Setting up screens**
		  o **Setting up code versions**
		  o **Diagnostic code setup**
		  o **Adding DSM and ICD codes**
		  o **Mapping DSM to ICD codes**
		  o **GAF maintenance**
		• **Custom comment setup**
		• **Correspondence entry setup**

Break	15 minutes	
Fiscal and Trust Administrative Setup	1 hour	• **General Ledger segment and account setup** • **DDS contract and rate schedule setup** • **Procedure code setup** • **Allocation Breakdown setup for Trust**
Work Flow Processing and alerts (part one)	1 hour	• **Work flow and alert setup**
Lunch	1 hour	
Work Flow Processing and alerts (part two)	2 hours	• **Work flow and alert setup**
Break	15 minutes	
Work Flow Processing and alerts (part three)	30 minutes	• **Work flow and alert setup**

CADDIS Module	Estimated Module Length	Module Components
Enhancements to Service Codes	30 minutes	• **Identifying service codes for payable services** • **Identifying service codes for Federal Home and Community Based Waivers** • **Identifying General Ledger expense codes for authorizations and payments**

Day One (8:00 a.m. – 5:00 p.m.)

CADDIS 301 – B System Administration Training for Regional Centers

Course Curriculum

CADDIS Module	Estimated Module Length	Module Components
Overview of System Administration for Regional Centers	1 hour	• **Overview of DDS System Administration responsibilities** • **Overview of Regional Center System Administration responsibilities** • **Report Sharing**
User Set up	1 hour	• **Creating new user accounts and passwords** • **Updating and deleting user accounts and passwords** • **Reactivating user accounts**
Break	15 minutes	
User Group Set up (part one)	2 hours	• **Overview of user, episode, and authorized employee user assignments** • **Creating new user groups** • **Adding users to groups using the user group and user screens** • **Role Based Security**
Lunch	1 hour	
User Group Set up (part two)	1hour	• **Assigning screen access to user groups** • **User assignment to restricted tabs (tab level security)**
User Sessions	15 minutes	• **Viewing user sessions**
System Setup (part one)	1 hour	• **Organization setup** • **Facility setup** • **Signing and co-signing rights setup**
Break	15 minutes	

System Setup (part two)	1 hour and 15 minutes	• **Custom comments**
		• **Audit trail setup**
		• **Inter and Intra-Regional Center Transfers**
		• **Clinical setup**
		   o **Configuring the service plan library**
		   o **Service plan types**
		   o **Service plan review types**
		   o **Case note types**

Day Two (8:00 a.m. – 5:00 p.m.)
CADDIS 301 – B System Administration Training for Regional Centers
Course Curriculum

CADDIS Module	Estimated Module Length	Module Components
System Setup (part three)	1 hour	**Form Configurator** **Custom comments setup** **Viewing the error log**
Fiscal and Trust Administrative setup (part one)	1 hour	**Creating General Ledger accounts** **Setting up payor groups** **Setting up payor group rankings**
Break	15 minutes	
Fiscal and Trust Administrative setup (part two)	1 hour and 45 minutes	**Setting up service codes** **Creating payor plans** **Updating and deleting payor plans** **Adding exclusion rules** **1099 setup** **General Ledger account setup for Trust Administration** **Disbursement frequency setup for Trust Money Management disbursements**
Lunch	1 hour	
Work Flow Processing and alerts (part one)	2 hours	**Work flow setup**
Break	15 minutes	
Work Flow Processing and alerts (part one)	1 hour and 45 minutes	**Alerts setup** **Messaging setup**

Pre-requisites for 301-A and 301-B

Pre-Requisite	Description
Computer literacy	Strong understanding of Microsoft Windows applications including using the World Wide Web and launching/closing applications.
Policies and Procedures	An overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area. An understanding of Regional Center policies and procedures.
Current job skills	Experienced and competent with System Administration processes.
Technical Skills	SQL or other database experience and a high-level understanding of System Architecture

Pre-Requisite	Description
CADDIS Training	Prefer participants who have attended Certified CADDIS Training. . This will provide participants with knowledge of CADDIS user processes and will increase their understanding of how System Administration functions fit into CADDIS.

One Day (8:00 a.m. – 5:00 p.m.)
CADDIS 302 – Ad Hoc Report Training
Course Curriculum

CADDIS Module	Estimated Module Length	Module Detail
Report writing overview	1 hour	• **Overview of Actuate** • **Overview of report server components** • **Using the Actuate User Manual** • **Using the Data Dictionary as a tool**
Using the Wizard	1 hour	• **Building a report using the Wizard**
Break	15 minutes	
Building Letters	1 hour and 45 minutes	• **Building a letter using template** • **Changing the letter format** • **Building a letter without a template** • **Customizing the letter**
Lunch	1 hour	
Building Reports	1 hour and 45 minutes	• **Adding to a report template** • **Changing the report format** • **Building a report without a template** • **Customizing the report**
Break	15 minutes	
Report Sharing	1 hour	• **Publishing the report** • **Sharing access to the report**
Editing reports	1 hour	• **Editing an existing CADDIS report**

Pre-requisites for 302

Pre-Requisite	Description
Computer literacy	Strong understanding of Microsoft Windows applications including using the World Wide Web and launching/closing applications.
Policies and Procedures	Solid understanding of DDS and Regional Center policies and procedures
Current job skills	Experience and competence with current DDS or Regional Center report building and report running processes.
CADDIS Training	Prefer participants who have attended Certified CADDIS Training. This will provide participants with knowledge of CADDIS user processes and will increase their understanding of how *ad hoc* report functions fit into CADDIS.